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RESERVE COMPONENT OFFICERS(U) ARMY WAR COLL CARLISLE  
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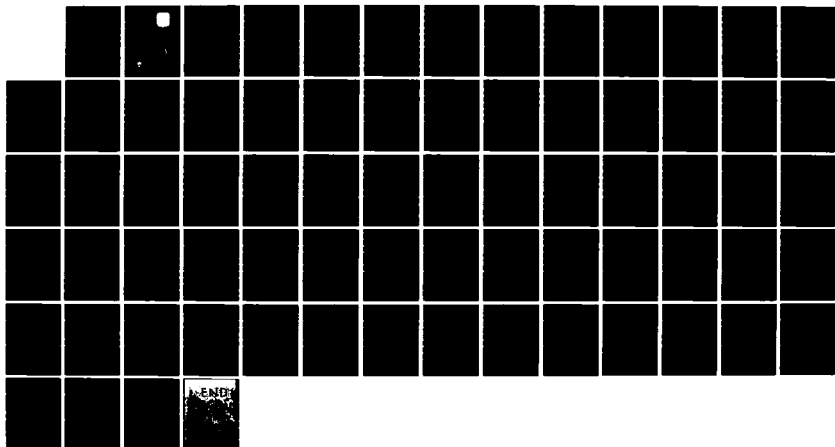
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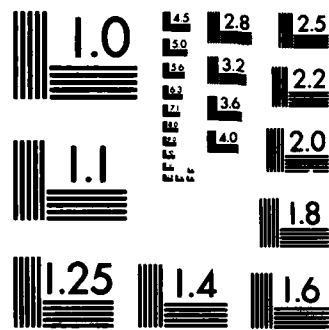
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# STUDY PROJECT

## MILITARY EDUCATION FOR PROMOTION OF FIELD GRADE ARMY RESERVE COMPONENT OFFICERS

BY

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|---|--|--|
| 1. REPORT NUMBER  | 2. GOVT ACCESSION NO.<br><b>A130 281</b> | 3. RECIPIENT'S CATALOG NUMBER                                  |
| 4. TITLE (and Subtitle)<br>Military Education for Promotion of Field Grade<br>Army Reserve Component Officers   |  | 5. TYPE OF REPORT & PERIOD COVERED<br>Study Project            |
|   |  | 6. PERFORMING ORG. REPORT NUMBER                               |
| 7. AUTHOR(s)<br>LTC C. Robert Secrist   |  | 8. CONTRACT OR GRANT NUMBER(s)                                 |
| 9. PERFORMING ORGANIZATION NAME AND ADDRESS<br>US Army War College<br>Carlisle Barracks, PA 17013   |  | 10. PROGRAM ELEMENT, PROJECT, TASK<br>AREA & WORK UNIT NUMBERS |
| 11. CONTROLLING OFFICE NAME AND ADDRESS   |  | 12. REPORT DATE<br>24 May 1983                                 |
|   |  | 13. NUMBER OF PAGES<br>64                                      |
| 14. MONITORING AGENCY NAME & ADDRESS (if different from Controlling Office)   |  | 15. SECURITY CLASS. (of this report)<br>Unclassified           |
|   |  | 15a. DECLASSIFICATION/DOWNGRADING<br>SCHEDULE                  |
| 16. DISTRIBUTION STATEMENT (of this Report)<br>Approved for public release; distribution unlimited.   |  |  |
| 17. DISTRIBUTION STATEMENT (of the abstract entered in Block 20, if different from Report)  |  |  |
| 18. SUPPLEMENTARY NOTES   |  |  |
| 19. KEY WORDS (Continue on reverse side if necessary and identify by block number)  |  |  |
| 20. ABSTRACT (Continue on reverse side if necessary and identify by block number)<br>The Army established the Combined Arms and Services Staff School, a captain-level course, to partially implement the recommendations of the Study Group for Review of Education and Training for Officers. Concurrently, the Army changed AR 135-155 so that this course would satisfy educational requirements for the promotion of Reserve Component officers to all field grades. However, the Command and General Staff College is offering only a resident version of this course, severely limiting RC officers' access to it. Moreover, the college |  |  |

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**USAWC MILITARY STUDIES PROGRAM**

by

US Army War College  
Carlisle Barracks, Pennsylvania 17013  
24 May 1983

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## ABSTRACT

**AUTHOR:** C. Robert Secrist, LTC, FA

**TITLE:** Military Education for Promotion of Field Grade Army Reserve Component Officers

**FORMAT:** Individual Study Project

**DATE:** 24 May 1983

**PAGES:** 64

**CLASSIFICATION:** Unclassified

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## CHAPTER I

### INTRODUCTION

#### BACKGROUND

The dramatic, geometric increase of USSR defense spending in the 1970s has greatly increased Soviet global capabilities. The US Army has answered, in part, with the AirLand Battle doctrine to respond to a variety of worldwide contingencies. In Western Europe, the Army may face the highly mechanized and mobile Warsaw Pact forces in highly technological combat. Low intensity conflict in an unsophisticated battlefield environment may confront the Army on other continents. Therefore, one of the major challenges to the Army leaders at all echelons is to train personnel to fight so that the Army can win in an engagement any place in the world under any conditions.

While the Soviets undertook during the 1970s the largest military build-up seen in modern time, US defense expenditures declined. The Reagan administration has committed the nation to reverse this trend through increased outlays for force modernization. Now the Army is challenged with the task of fielding numerous new weapons systems. Even the Army's Reserve Components are benefiting in several ways from the modernization. Several roundout organizations are receiving the new systems simultaneously with their fielding in the Active Components. In the first action ever of its kind, Congress authorized the National Guard Bureau in FY 1982 to procure \$50 million of new equipment. Further, as the Active Army fields

its new equipment, the Reserve Components will field the displaced equipment. Active Army armored divisions and mechanized infantry divisions are converting to the Division 86 TOEs concurrently with the arrival of the modern equipment; present plans are for the similar National Guard divisions to initiate the conversion in 1984. The equipment and force modernization in the Total Army will result in the Army's increased capability to deter aggression and to win a war if it occurs.

The decision to modernize the force accompanied a decision not to expand the strength levels of the Active Army. Priorities had to be set. Since the costs to increase personnel strength and to modernize equipment simultaneously were too high, the decision not to increase manpower has placed greater reliance upon the Reserve Components. Over 50% of the ground forces are located in the Reserve Components--including the majority of the infantry, armor and field artillery battalions. Nine of the sixteen Active Army divisions include National Guard and Army Reserve units. Over 65% of the logistic support units for the Active Army are found in the Army Reserve and National Guard. The Department of Defense is programming force expansion in the Army National Guard by adding two divisions to be constituted from existing brigades: a mechanized infantry division in 1984 and a light infantry division in 1985. Within the framework of the Total Army Policy, the Reserve Components are assuming a more vital role.

A 21 August 1970 memorandum from Secretary of Defense Melvin R. Laird planted the seed for the Total Army Policy: "a total force concept will be applied in all aspects of planning, programming, manning, equipping and employing Guard and Reserve Forces." This concept was strengthened and expanded into policy by Secretary of Defense James R. Schlesinger, Jr., who stated on 23 August 1973 that "The Total Force is no longer a 'concept.' It is now the Total Force Policy which integrates the active Guard and

Reserve Forces into a homogeneous whole." Although considerable steps were taken in the 1970s towards incorporation of the Army Guard and Army Reserve into the Total Army scheme, actually there had been significant shortfalls in manpower, personnel, and funding for the Reserve Components to achieve the Total Force aims. Even so, the Reagan administration has reaffirmed the policy and committed more funds to upgrade the Army National Guard and the Army Reserve than did any administration in the 1970s. As evidence of this support, in June 1982 Secretary Casper W. Weinberger told the Reserve Forces Policy Board:

I wish to affirm my belief in--and full support of--the Total Force Policy. The Guard and Reserve are going to be full partners with their active counterparts in this administration . . . my office will not accept substandard support or degradation of the Reserve Forces.<sup>1</sup>

This policy will impact throughout the Guard and Army Reserve. As the Active Army implements the doctrine of the AirLand Battle, restructures the force to the Army 86 design, and adds new equipment to support force modernization, similar action will commence in the Reserve Components.

These Army goals and objectives demand a higher quality leader in the future than in the past. The new how-to-fight manual, FM 100-5, succinctly states the importance of leadership: "The four basic challenges to the Army will be the battlefield, leadership, readiness, and training."<sup>2</sup> Hence, the Reserve Component officer must be trained so that he or she can either effectively elevate a unit to the highest readiness level attainable or, in the case of the Individual Mobilization Augmentees or Individual Ready Reserve personnel, will be prepared to successfully fill a vacancy upon mobilization. What then is the proper military education for the Reserve Component officer who is already overwhelmed by a plethora of military and civilian demands upon his time?

The problem of a proper, effective military educational system to prepare Army officers is not new. It has been the focal issue of five major studies by the Army since WW II. The first, in the fall of 1945, was conducted by the War Department Military Education Board, which was tasked to prepare a plan for the postwar educational system of the Army. Its recommendations were responsible for the establishment of the National War College and the Armed Forces Staff College, for the creation of additional extension courses for the Reserve Components, and for the expansion of the civilian schooling program. After reviewing the adequacy and the scope of the Army educational system, the 1948 Department of the Army Board on Educational System for Army Officers recommended the reestablishment of the Army War College, the adoption of higher educational goals for Regular Army officers, and a more centralized direction of the Army school system. The Department of the Army Board to Review the System of Officer Education and Training in 1958 studied officer education and training from the time of commissioning to the completion of a senior service college. Established in 1965 following a major reorganization of the Army and after the large initial infusion of troops into Vietnam, the Department of the Army Board to Review Army Officer Schools reviewed the entire Army officer education and training system and made comprehensive recommendations for officer schooling from the date of commissioning until attendance at the senior service colleges.

The most recent major study group, the Review of Education and Training for Officers Study Group (RETO), was established in August 1977 by the Chief of Staff of the Army, who directed a review of officer education and training from precommissioning through career completion to determine the requirements based on Army missions and individual career development needs and to propose policies and programs to meet those needs.<sup>3</sup> In 1978 the

study group published a five-volume assessment of an officer's career developmental program to meet the Total Army's needs for the 1980s and 1990s.

The Chief of Staff of the Army has approved most RETO recommendations as the basis for revising the Total Army's system of officer education and training. Accordingly, in November 1979 the Army's Deputy Chief of Staff for Operations and Plans specified implementation actions and milestones which TRADOC subsequently detailed in its own implementation plans. ARNG and USAR tour officers have been added at TRADOC headquarters, at Ft. Leavenworth, and at several branch schools for resolution of the Reserve Component issues contained in the RETO proposals.

Recognizing the inability of many Reserve Component (RC) officers to attend the resident courses, the Chief of Staff of the Army approved, in RETO issue 20i, the concurrent development of alternatives for RC officers regarding new courses or modification of existing courses.<sup>4</sup> Correspondence courses, USAR schools, or resident/nonresident options were to be simultaneously developed with the creation of new resident courses--thus enabling RC officers to have access to new educational requirements. In reality, his educational directive has not yet been translated into action.

The Combined Arms and Services Staff School (CAS<sup>3</sup>) illustrates the difficulties. Ft. Leavenworth has from the beginning resisted exporting CAS<sup>3</sup> or furnishing a correspondence course for it. Yet, if all eligible RC officers were to apply for attendance at CAS<sup>3</sup>, they would be unable to attend because of the lack of available positions and funds. The National Guard Bureau and the Office of the Chief of the Army Reserve have been uninterested in including CAS<sup>3</sup> as an educational requirement for RC officers, especially if it adds to the RC officers' mandatory schooling. Moreover, NGR 600-100 is silent on the issue. Thus, in reality there is a

disparity between the education of Active Component (AC) and Reserve Components officers. AC Officer Personnel Management Directorate (OPMD) managed officers, mostly captains, will take the CAS<sup>3</sup> course in their sixth, seventh, eighth, or ninth year of commissioned service when the course is fully implemented in 1986 or 1987. In contrast, the RC officer could conceivably go through his career without taking the course.

Promotion gates, which are unique to RC officers, present another difficulty. While the Active Army officers are supposed to be programmed for the advanced courses prior to commanding at the company level, most are assigned to the courses in the third through the fifth years of Active Federal Commissioned Service (AFCS).<sup>5</sup> Their RC counterparts, on the other hand, are required to complete the officer advance course for promotion to major under Army regulations, possibly postponing advanced course education until the eleventh year of service, some time after the AC officer has finished CAS<sup>3</sup>. Change 9 to AR 135-155 allows the RC officer to use CAS<sup>3</sup> in lieu of the Command and General Staff Officers' Course (CGSOC) for promotion to lieutenant colonel and colonel, but the CAS<sup>3</sup> education for the RC officer could take place up to eight years after the AC officer completes the course. Under NGR 600-100, the educational requirement for promotion to lieutenant colonel stipulates 50% completion of CGSOC, while CAS<sup>3</sup> satisfies no requirement for promotion to major and lieutenant colonel. Thus these regulations setting forth educational requirements for promotion of AC officer lack consistency and are incongruent with the educational schooling for AC officers.

## STATEMENT OF THE PROBLEM

To meet the challenges placed upon them by the Total Army Policy, the Reserve Components must be capable of rapid mobilization and deployment and must be trained to fight and win on the battlefield. A well-educated officer corps is essential for the Reserve Components as well as the active force to satisfy this goal.

Therefore, what is an adequate system of formal officer education and promotions in the 1980s and 1990s for Army field grade officers in the Reserve Components? This paper will investigate this question and will offer some solutions. In the process, the following related questions will likewise be probed:

- o Does the Total Army Policy imply that the formal RC officer education should parallel that of the AC officers?
- o Should the officer education schools, to insure accessibility for all RC officers, be directed to prepare exportable versions and correspondence courses for new and revised courses that are required for RC officer promotions?
- o Should funds be available to send all RC officers to resident schools who are able to attend?
- o Should the educational requirements as promotion gates for RC officers be modified or deleted?

## THE SCOPE OF THE STUDY

This study concentrates on the educational requirements for Selected Reserve officers in the Army Reserve Components necessary to qualify for promotion to major, lieutenant colonel, colonel. It covers all Army RC



officers of all OPMD-managed specialties, except the Army Medical Department, Chaplains, the Judge Advocate General's Corps and those assigned to the SSVC system.

## CHAPTER I

### ENDNOTES

1. US Department of Defense, Reserve Forces Policy Board, Annual Report of the Reserve Forces Policy Board Fiscal Year 1981, p. ix.
2. US Department of the Army, Field Manual 100-5, p. 1-1.
3. US Department of the Army, Study Group for the Review of Education and Training for Officers, A Review of Education and Training for Officers (RETO), p. viii.
4. US Department of the Army, Office of the Deputy Chief of Staff for Operations and Plans, Review of Education and Training for Officers (RETO) Implementation Plan, p. 52. The Chief of Staff of the Army approved all of the RETO issue #20 proposals, which pertain to the Reserve Components. See Annex Q of the RETO study Group's report.
5. The Army policy is that AC officers will attend an advanced course prior to assuming the command of a company-level unit. However, lieutenants and captains do command prior to attending the course. In the last couple of years, up to 15% of the combat arms officers and 50% of combat service support officers had commanded more than six months before going to an advanced course.

## CHAPTER II

### ACTS GOVERNING OFFICER PROMOTIONS

Army and NGB regulations stipulate minimum military educational standards as part of the promotion qualifications for RC officers. Therefore, any proposed RC officer education system must incorporate associated modifications of the qualifying criteria for promotion. So any investigation of the officer education system must take into account criteria for promotions; and any proposed modifications to this system should propose, as a result of these modifications, necessary revisions in the promotion criteria.

#### OFFICER PERSONNEL ACT OF 1947

As the nation returned to normality after WW II and proposed to revert to the pre-war small, regular military, the legislative and executive branches of government sought an officer management system. The answer was the Officer Personnel Act of 1947 (OPA), the first statute governing permanent promotions and elimination of regular officers in all of the services. Although the act did not merge or unify the services' promotion systems, the legislation was intended to serve as a catalyst for standardizing the separate systems.

OPA transformed the Army's seniority promotion system to a system of promotion by selection. Previously, the Army only used meritorious selection for promotion to grades above colonel. The act provided for Army promotions on a "fully qualified" basis, essentially assuring qualified officers a career up to the lieutenant colonel grade. The selection boards eliminated the unqualified, incompetent officers. In contrast, the Navy

promoted only "best qualified" officers, forcing out 20% of the officers starting at the O4 grade in order to satisfy the statute-mandated criteria of each grade.

The Officer Personnel Act was drafted on the assumption that the services would have a "continuing need for many thousands of temporary officers for years into the future."<sup>1</sup> OPA's provision for temporary officers was not to be used for an indefinite amount of time, but only for as long as the number of regular and reserve officers on active duty exceeded the OPA authorized regular officer strength ceilings. Temporary officers on extended active duty, not the career officers, would be the victims of any reduction-in-force due to OPA's provisions. This temporary system became the focus of critics' arguments of OPA in ensuing years.

#### OFFICER GRADE LIMITATION ACT OF 1954

In 1947 policymakers did not contemplate the need for a large standing army with a sizable officer corps. As OPA placed ceilings on the number of regular officers, it granted to the service secretaries the latitude to make temporary promotions when the number of regular and active duty reserve officers exceeded allowable limits. During the early 1950's, Congress voiced misgivings about the increasing number of senior officers and the unrestrained awarding of temporary promotions. Specifically, Congress thought OPA's temporary officer language was too broad for the Navy and found the statute's lack of restrictions on such promotions in the Army and Air Force objectionable.

Therefore, Congress enacted the Officer Grade Limitation Act of 1954 (OGLA), which controlled temporary promotions and limited the number of officers, both regular and reserve, who could serve on active duty in the grades of major and above. It recognized through OGLA the impossibility to

forecasting required military strength levels and temporary officer billets. OGLA, along with OPA, gave rise to a dual-track system of temporary and permanent promotions in the Army and produced an Army officer management system basing assignments, precedence, and other attributes of grade and rank on temporary seniority.<sup>2</sup>

#### DEFENSE OFFICER PERSONNEL MANAGEMENT ACT

The Air Force had its own difficulties with the grade ceilings in OGLA. Nine times Congress, at the Air Force's request, granted temporary relief for that service from OGLA's provisions. While granting such relief in 1972, Congress directed the Secretary of Defense to submit a comprehensive report, addressing the grade limitations and requirements for each service. This mandate stimulated the first major effort since OPA in 1947 to completely revise officer personnel management. The product, the Defense Officer Personnel Management Act (DOPMA), was enacted on 12 December 1980 with a two-year transition period commencing on 15 September 1981.

In superseding the Officer Personnel Act and the Officer Grade Limitation Act, DOPMA provides the standardization and uniformity in the management of officers in all services such as Congress intended in 1947. DOPMA thus provides a common law governing the promotion, management, and tenure of all regular and reserve officers on active duty below the grade of brigadier general. It replaces the individual systems of the services, subjecting all promotions to common criteria and regulation.<sup>3</sup> For example, the Army's "fully qualified" system has been replaced by a "best qualified" system of promotion for the grades of captain through colonel.

Congress addressed other dissatisfactions with the previous statutes in the passage of DOPMA. DOPMA specifies statutory limitations on the number of officers in the various grades. Under DOPMA, all promotions are made on a permanent basis as vacancies occur, thereby ending temporary promotions. While eliminating the tenure which had previously accrued with promotion to the 04 to 06 grades under the previous statutes, DOPMA integrates the "career reserve officer" into the regular force. When captains are selected for major, the services tender a regular commission if the captain is a reserve officer on active duty. For the Army, the act maintains the "up or out" system, while it incorporates the "best qualified" concept for captains through colonels. Eighty percent of the captains will have opportunities for promotion to major as vacancies occur, seventy percent of the majors to lieutenant colonel, and fifty percent of the lieutenant colonels to colonel. Nonselected officers will be selected out of the service. DOPMA institutionalizes the "best qualified" idea, terminates the temporary promotion system, and merges the management system of regular officers and reserve officers on active duty.

DOPMA excludes the following Reserve Component officers from its provisions: those RC officers who are on active duty for training, who are assigned at the National Guard Bureau, and who are serving on special active duty tour assignments. Also, this act avoids placing RC officers mobilized with units in promotion competition with active duty officers, thereby insuring that these mobilized RC officers continue to compete for Reserve Component promotions under laws governing the Reserve Components. Even though Congress has devoted considerable attention to the management of active duty officers since WW II, its interest in management systems for RC officers has been comparatively low. Just one comprehensive piece of

legislation for managing RC officers, the Reserve Officer Personnel Act of 1954, has been passed during the last three decades.

#### RESERVE OFFICER PERSONNEL ACT OF 1954

Today, the Reserve Officer Personnel Act of 1954 (ROPA) governs personnel management of officers in the Reserve Components and specifies the methods and criteria for officer appointments, promotions, and separations. In the statute, Congress intended to make the management of RC officers like that of AC officers, extending its desire for a standardization among the services as expressed with the passage of OPA. As stated before the Senate during the bill's deliberation, ROPA was:

to provide for officers of the Reserve Components a statutory basis for promotion and elimination comparable to that provided for officers of the regular components by the Officer Personnel Act of 1947.<sup>4</sup>

Because by 1954 Congress had not resolved the incongruity between its intentions and the legislative realities for the management of AC officers, ROPA likewise did not satisfy Congress's goal of establishing uniformity in the personnel management systems. Under ROPA, the Reserve Components of the Army and the Air Force employ permanent promotion systems; by contrast, the Reserve Components of the Navy, Marines, and Coast Guard employ temporary promotion systems. The latter services use parallel procedures for RC officer promotions and officer promotions in the Active Components, which granted temporary promotions prior to the implementation of DOPMA.

Temporary promotions have caused inconsistencies for the timing of promotions between the Active Components and the Reserve Components and among the RC services. For AC officers, promotion timing is a direct function of an officer's inclusion in a zone of consideration and the

officer's subsequent placement on an Active Duty List. The Reserve Components of the Navy, Marines, and Coast Guard pair, for promotion purposes, each officer with an AC officer of the same rank, causing the personnel actions of the RC officer to coincide with those of the AC officer. Such linkage is not employed by the Army. Army RC officers who meet minimum time-in-grade and time-in-service requirements are mandatorily considered for promotion and are promoted if they are "fully qualified." The Army RC officer can be promoted prior to the mandatory consideration if the officer satisfies time-in-grade requirements, is the "best qualified" among the "fully qualified" and occupies an officer position calling for the next higher rank. ROPA fails to provide uniformity in the timing of promotions and in the use of the "best qualified" criterion.

Since the enactment of ROPA, the Department of the Army published regulations setting minimum military education standards for RC officer promotion in the Army Reserve and National Guard. AC officers are not subject to similar requirements under Army regulations. The Army denies promotions to RC officers who do not complete minimum educational requirements. The regulatory relationship between education and officer promotions in the Army Reserve Components obliges reformers of military education systems to consider the ramifications on promotions of such proposals.

To summarize, several differences exist between the officer promotion system in the Army's Reserve Components and the personnel management systems elsewhere in the military:

- The Active Components utilize promotion selection lists of officers in defined zones of consideration; the Army RC's do not use selection lists for promotions to the grades of first lieutenant through lieutenant colonel.



- The Army RC's provide for mandatory consideration for promotion to the grades of second lieutenant through lieutenant colonel when time-in-grade and total-commissioned-service criteria are satisfied; the Active Components do not.

- The Army RC's use a unit vacancy promotion system; the Active Components do not.

- The Active services use a "best qualified" criterion under DOPMA for promotion to field grade rank; the Army RCs use "fully qualified" for mandatory promotions and "best qualified" for unit vacancies.

- The Navy Reserves use a "running mate" system with the "best qualified" receiving promotions; the Army RCs do not,

In conclusion, consistency and uniformity are lacking in promotion criteria and policies for the Army's Reserve Components and for Active Components under regulations, ROPA, OPA, and DOPMA.

#### RESERVE OFFICER PERSONNEL MANAGEMENT ACT

Concurrently with the development of the Defense Officer Personnel Management Act in the mid-1970's, the Department of Defense proposed revisions, collectively called the Reserve Personnel Management Act (ROPMA), to the Reserve Officer Personnel Act, to make it more uniform with the DOPMA proposals. As an example of that desired compatibility, the proposed statutes would have had National Guard and Army Reserve officers selected for promotion from a centralized list using the "best qualified" criterion instead of the "fully qualified" basis of ROPA. These legislative efforts were unsuccessful and, prior to 1983, the ROPMA proposals had not been translated into draft legislation.

In 1980, the House Committee on Armed Services expressed a desire for ROPMA legislative recommendations from DOD upon enactment of DOPMA. The

efforts of a subsequent DOD ROPMA Task Force did not lead to fruition because the task force members were given the assignment as an additional duty and did not have the time to devote to the task force's activities. Further, the legislative drafts required a plethora of preliminary research and preparation, which was impossible with the limited available time. Therefore, the Deputy Assistant Secretary of Defense for Reserve Affairs established in July 1981 the DOD ROPMA Steering Committee of general officers to guide and oversee the DOD ROPMA Work Group, which was to develop proposed ROPMA legislation.<sup>5</sup> Subsequently, DOD organized a legislative drafting team which should have legislation drafted for submission to Congress by mid-1983.

For the officers in the Army National Guard and the Army Reserve, ROPMA should attain commonality and compatibility with DOPMA by revising the laws for RC officers below the grade of general officers. Most likely, newly enacted ROPMA will establish a permanent promotion system which will move officers up to O6 grade by year-groups. Just as is accomplished with the Active Duty Lists for officers, RC officers will probably be selected from a primary zone for consideration for grades O3 through O5 using the criterion of "best qualified" among those who are "fully qualified." The chances are excellent that the Secretary of the Army will be granted authority to promote 15% in a secondary zone of consideration--below the zone--for the O4 to O6 grades. Regardless of the contents of ROPMA when it is passed, it should make a giant step towards achieving uniformity in the management of officers among the Reserve Components and between the Reserve Components and the Active Components. Standardization will be more nearly realized.

However, the unique needs of the Reserve Components will be preserved. For example, the Unit Vacancy Promotion System will be retained basically

in the present form. Significantly, none of the ROPMA proposals modify the statutes mandating minimum educational standards for RC officers to be eligible for promotion at each grade. These will be two areas in which the RC officer management system will continue to differ from that for AC officers.

## CHAPTER II

### ENDNOTES

1. US Congress, House, Committee on Armed Services, Army and Navy Promotion Bill, Report No. 640 to accompany HR 3830, p. 4. (Hereafter referred to as "Officer Personnel Act of 1947.")

2. US Army War College, Strategic Studies Institute, Defense Officer Personnel Management Act (DOPMA): Selected Issues, p. 2.

3. Ibid., p. 5.

4. US Congress, Senate, Committee on Armed Services, Reserve Officer Personnel Act of 1954, Report No. 2010 to accompany HR 6573, p. 3.

5. US Department of Defense, Reserve Forces Policy Board, Annual Report of the Reserve Forces Policy Board Fiscal Year 1981, p. 22.

## CHAPTER III

### RETO STUDY GROUP'S REPORT

The previous chapter reviewed the evolutionary developments since WW II leading to DOPMA for AC officers and to the ROPMA proposals for RC officers. For the same time period, the first chapter summarized the major Army studies on officer education and training. Recent changes to the system for formal officer military education can be traced to the recommendations of the Study Group for Review of Education and Training for Officers (RETO). This chapter describes the portion of that study group's recommendations which pertain to formal military education of RC field grade officers--the advanced courses, CAS<sup>3</sup>, and CGSOC--and which modify the educational promotion criteria for those officers.

Several factors contributed to the formation of the RETO Study Group. Following a detailed analysis of the 1973 Mid-East War, TRADOC modified school curricula to emphasize technical competence while dropping traditional subjects because of the lack of funds to extend the lengths of the courses as it desired. The objective of this curricular change was to prepare the officer corps to exercise leadership superior to that of our potential enemies and to field the new sophisticated weapons systems in our Army. By the spring of 1977, there was a consensus that the Army was not producing the officers with these capabilities. Concurrently, the Office of Management and Budget claimed too much money was going for officer education and training and suggested reducing these costs.<sup>1</sup> Within the context of these concerns, the Chief of Staff of the Army created, in

August 1977, the Office Training and Education Review Group (OTERG)-- subsequently called the RETO Study Group--with the following mission:

The mission of the OTERG is to determine officer training and education requirements based on Army missions and individual career development needs. Based on those requirements, develop training and education policies and programs which combine self-development, unit development, and institutional development in a phased schedule from pre-commissioning or pre-appointment training through career completion.<sup>2</sup>

Based upon the mission statement, the following objectives guided the RETO Study Group's efforts in developing its final report:

- The report must be based upon the Army's peacetime and wartime missions.
- The report must meet the challenges of the 1990s.
- The report must satisfy individual career needs in both the Active and Reserve Components without adversely affecting an officer's career during the implementation of the report's recommendations.
- The report's implementation must be economically efficient.
- The report must be consistent with the Army's personnel management systems, including the Officer Personnel Management System (OPMS).

#### EDUCATIONAL NEEDS FOR FIELD GRADE OFFICERS

To determine the educational and training needs for field grade officers, the RETO Study Group explored the nature of those officers' duties. The analysts examined the most common and significant duties of field grade officers in all OPMS specialties and found that most tasks involved staff and management activities. These tasks include common executive skills for handling staff, administrative, and managerial positions and for applying intellectual problem solving and decision making techniques. Furthermore,

the Study Group determined that most majors and lieutenant colonels were assigned staff functions most of the time.

The RETO Study Group highlighted the differences between responsibilities of company grade and field grade officers to determine the Army's needs for field grade officer development. Concluding that the training for company grade officers is primarily technical, the group noted that the company grade officers' focus is "relatively narrow, primarily-speciality-specific, and troop-oriented."<sup>3</sup> Although staff officers must maintain their speciality knowledge, especially when assigned to the battalion and the brigade levels, the field grade officer should be capable of working beyond branch-specific skills to exhibiting a broader understanding of management skills, of combined arms doctrine, and of staff procedures and organization. This critical career development means this officer needs staff training for job performance as a major. All majors and lieutenant colonels assigned to staff positions in field units and headquarters within a division need fundamental managerial skills and working knowledge about staff organizations and procedures. At this level, they should have knowledge of all branches in order to effectively apply doctrine for employment of combined arms and services. According to the Study Group, this new learning could best take place in a formal school environment where the members of the various branches can interact in a synergetic environment to synthesize their divergent expertise.

The group further concluded that the command and management functions of company grade and field grade officers are disparate. While company officers utilize personal supervisory and counseling skills, the field grade officers increasingly call upon decision making and planning techniques from management sciences. Middle management abilities emerge with responsibilities for training, supply, maintenance, administration, and the

tactical employment of the combined arms and services. At higher levels in the command hierarchy, field grade officers face greater challenges to communicate through lucid directives, orders, estimates and plans while maintaining a sensitivity for those within the command. Part of the RETO recommendations answered the field grade officer's needs for broader managerial skills as compared to those required of a captain.

From this analysis of the tasks performed by majors and lieutenant colonels, the RETO Study Group determined that all field grade officers required staff schooling; but the Army's educational system did not meet this need. Figure 1 depicts the system at the time of the RETO study. Figure 2 depicts the RETO Study Group's recommendations.

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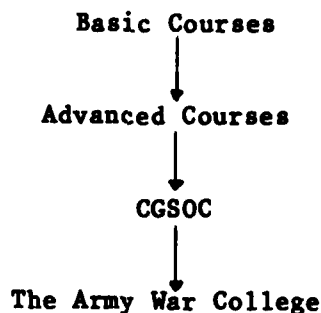


FIGURE 1: The Army's formal military education system for officers at the time of the RETO Study Group's report (1978). (These are the current qualifying courses for educational requirements for promotion in NGR 600-100.)

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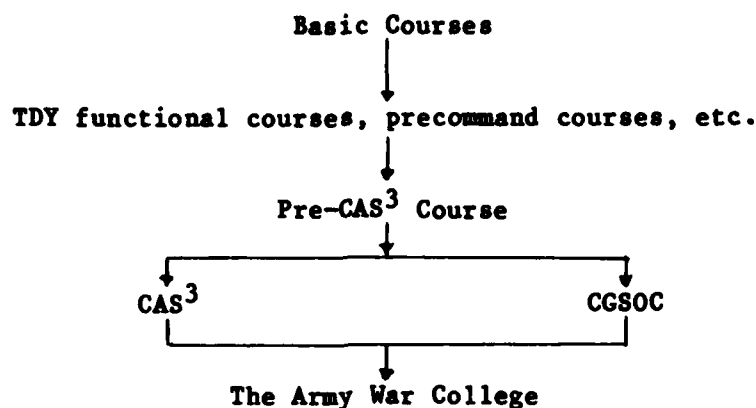


FIGURE 2: The Army's formal military education system for officers as recommended by the RETO Study Group.

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#### ADVANCED COURSES

Prior to the introduction of CAS<sup>3</sup>, field grade officers received most of their staff education and training for battalion and brigade assignments at an advanced course or on the job. The RETO Study Group criticized this for two reasons. Because the advanced courses were studied soon after an officer's promotion to captain, the group asserted that this was prematurely poor timing. Instead, this staff education should occur upon the officer's promotion to major. Second, the advanced courses taught branch subjects, not the generic topics which officers needed for combined arms and service staff work. Thus, according to the RETO Study Group, the advanced courses gave meager preparation for field grade staff assignments, so that many majors were in reality learning staff functions and processes on the job prior to their attendance at the Army Command and General Staff College (CGSC). Because the Study Group determined that the formal advanced courses were inappropriate for educating captains, it proposed that those

courses be replaced by a variety of educational and training alternatives, such as unit and assignment experience, on-the-job training, nonresident instruction, functional courses, unit schools, and self-study. Furthermore, they recommended that the staff schooling for field grade officers not be part of these replacements for the advanced courses.

#### COMBINED ARMS AND SERVICES STAFF SCHOOL

If the advanced courses were inappropriate, what was the RETO Study Group's recommendation for educating field grade officers on staff skills and procedures? The Combined Arms and Services Staff School (CAS<sup>3</sup>) at Ft. Leavenworth, a newly designed school, was to provide this staff education.

The Study Group concluded that only 40% of the AC officers of each year group had formal staff schooling as a result of their attendance at the resident CGSOC. The 60% not selected and many RC officers had an educational void which CAS<sup>3</sup> would fill.

To assure accessibility to CAS<sup>3</sup> for all members of the Total Army, the Study Group recommended that the CAS<sup>3</sup> material be offered through three options: a resident course, a nonresident course, and a component of the resident CGSOC. This variety of options was to insure the schooling of all AC and RC majors for service as staff officers within a division.<sup>4</sup>

The resident CAS<sup>3</sup> was designed as a nine-week, 297-hour course attended by 80% of the majors on active duty and approximately 3% of the RC majors.<sup>5</sup> Shorter than the RC CGSOC, the nine-week CAS<sup>3</sup> would afford a greater opportunity for the RC officer to take leave from civilian employment to attend resident schooling.

The other 20% of the AC majors were to study the CAS<sup>3</sup> material by their attendance at CGSOC. For the Army National Guard and the Army

Reserve, the number of RC positions at the 42-week CGSOC were to be increased from four to fourteen, improving the RC officer's opportunity to study the CAS<sup>3</sup> subjects in a resident course.

Recognizing the inability of all RC officers to attend this resident CAS<sup>3</sup> or CGSOC, the RETO Study Group said "a nonresident CAS<sup>3</sup> course must be prepared and offered"<sup>6</sup> and a CAS<sup>3</sup> USAR school course should be developed. Through this nonresident approach, all RC majors would also be educated to function as staff officers.

To bring all participants to the same plateau of knowledge on Army doctrine and organization, the Study Group recommended a 120-hour, nonresident pre-CAS<sup>3</sup> course as a prerequisite for selection consideration for attendance at both CAS<sup>3</sup> and CGSOC. Active Army officers were to enroll in the pre-CAS<sup>3</sup> course upon promotion to captain and to pass a locally proctored examination on the course material by the end of the tenth year of commissioned service.

So that the Army could maximize the benefits for officers staff schooling, all AC officers were to attend CAS<sup>3</sup> or CGSOC soon after selection for promotion for major, but prior to the end of the twelfth year of service. RC officers were to attend after completion of the nonresident pre-CAS<sup>3</sup> course and its examination.

The mission of CAS<sup>3</sup> was to "train all majors of the Active and Reserve Components for service as field grade staff officers with the Army in the field, in peace or war."<sup>7</sup> Thus the course was designed to standardize staff procedures and Army doctrine by teaching the students how to prepare staff documents at the battalion and brigade level and by instructing combined arms and services within a division. Additionally, the course was to teach techniques for efficient management of such resources as personnel, equipment, time, and money within the division. By concentrating on

staff procedures and techniques for staff assignments common to most majors, CAS<sup>3</sup> was to remedy the staff educational void defined by the Study Group.

#### COMMAND AND GENERAL STAFF COLLEGE

The findings of the RETO Study group showed that 20% of each year group promoted to major occupied positions demanding higher-ordered, complex staff skills and more advanced knowledge than that offered in the current CGSOC. Therefore, the study group recommended a new CGSOC to be studied by only this 20% of the AC majors instead of the 40% that had attended the course. Its content would be intellectually deeper and more intense because the student body would be more select and all students would have to complete the nonresident pre-CAS<sup>3</sup> prior to attending the college. CAS<sup>3</sup> subjects would be offered at the beginning of the revised CGSOC. The RETO Study Group's proposal to prepare a cadre of better educated field grade officers was expressed in its statement of CGSOC's purpose:

The fundamental purpose of the USACGSC course would be to educate and train selected officers in the higher order skills necessary for the coordination and integration of combined arms formations, and the necessary high level staff skills of personnel management, all-source intelligence collection and evaluation, and logistics on the modern battlefield. The course would also educate officers more effectively in resource management, training management, coalition warfare, analytical techniques, conceptual skills, and communicative arts.<sup>8</sup>

Believing firmly that the staff training should occur during the tenth to twelfth years of service, soon after selection for major, the RETO Study Group recommended that a CGSC selection board convene immediately following the majors' promotion board meeting. Completion of the 120-hour pre-CAS<sup>3</sup>

course and its examination was to be a prerequisite for selection consideration for CGSC. All AC officers not selected for CGSC were to be programmed for CAS<sup>3</sup> attendance, guaranteeing that all AC field grade officers would receive this crucial staff training. (See Figure 3.) However, CAS<sup>3</sup> graduates would still be able to study CGSOC under the RETO proposals.

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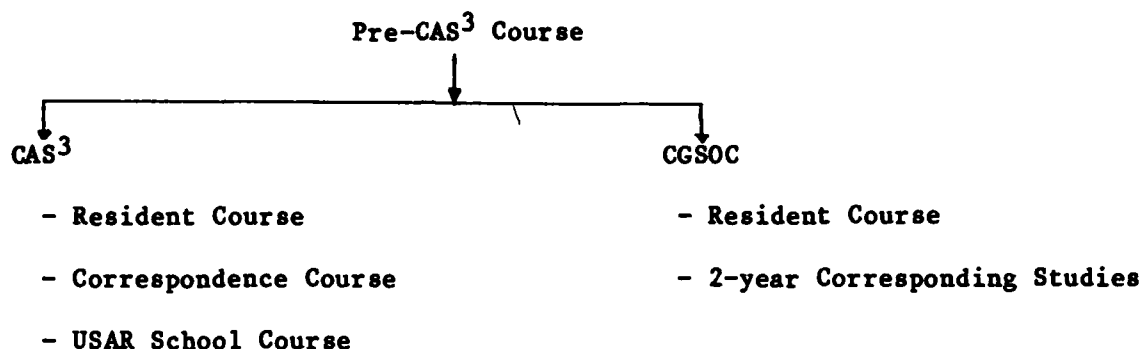


FIGURE 3: Options for generic staff education as proposed by the RETO Study Group.

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The Study Group proposed only one version of a nonresident CGSOC. Operated similar to the Army War College's Corresponding Studies Program, this nonresident CGSOC would be offered to two hundred Active Component Army officers annually. It would be a two-year correspondence course, replacing the nonresident CGSOC program presently available by correspondence and through the USAR schools. (See Figures 3 and 4.)

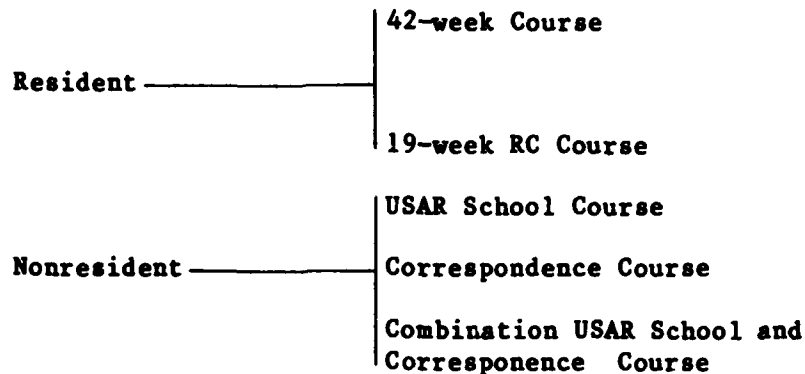


FIGURE 4: Options for CGSOC at the time of the RETO study. These are also the current options.

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The RETO Study Group built in increased opportunities for field grade officers in the Reserve Components to receive staff training. The number of spaces for RC officers were to increase from four to fourteen in the new CGSOC; the number of spaces in the resident CAS<sup>3</sup> were to be 288, a fifty percent increase over the spaces in the present Reserve Components resident CGSOC, which was to be discontinued. Additionally, two hundred RC graduates of CAS<sup>3</sup> would be accepted each year for the two-year CGSC Corresponding Studies Program. The Study Group proposed these options to insure that essential staff skills would be developed in RC field grade officers in order to meet the Total Force readiness requirements.<sup>9</sup>

#### EDUCATIONAL QUALIFICATIONS FOR PROMOTION

In order for staff training to be taken upon selection for promotion to major, the officer would need to complete the pre-CAS<sup>3</sup> nonresident course and pass an examination on it as a captain. Therefore, the RETO group concluded that there was a need for defining an educational requirement, that is a "promotion gate," for consideration for promotion to major.

However, the elimination of the advanced courses would make the advanced course promotion gate for RC officers obsolete. In its place, the Study Group recommended that a new Department of the Army policy direct that all Army officers, Active and Reserve Components, complete the 120-hours, nonresident pre-CAS<sup>3</sup> course as a minimum educational requirement for consideration for major.

The RETO report gave much less attention to promotion gates for lieutenant colonel and colonel. Since CAS<sup>3</sup> was proposed as the primary means for achieving staff training, CAS<sup>3</sup> completion was to be an additional criteria for promotion consideration to these grades. Consequently, the RETO Study Group recommended that the following options satisfy the minimum educational criteria for Reserve Component officer promotion to lieutenant colonel and colonel: CAS<sup>3</sup>, CAS<sup>3</sup> by correspondence course, CAS<sup>3</sup> taught in the USAR schools, CGSOC, and nonresident CGSOC.

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|                                |                    |
|--------------------------------|--------------------|
| Captain to Major:              | An Advanced Course |
| Major to Lieutenant Colonel:   | One-half of CGSOC  |
| Lieutenant Colonel to Colonel: | CGSOC              |

FIGURE 5: Minimum educational requirements for RC officer promotion prior to the RETO Study Group's report.

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|                                |                                       |
|--------------------------------|---------------------------------------|
| Captain to Major               | Pre-CAS <sup>3</sup>                  |
| Major to Lieutenant Colonel:   | One-half of CGSOC or CAS <sup>3</sup> |
| Lieutenant Colonel to Colonel: | CGSOC or CAS <sup>3</sup>             |

FIGURE 6: Minimum educational requirements for RC officer promotion as recommended by the RETO Study Group.

### SUMMARY

According to the RETO Study Group, the major weakness in the education and training of field grade officers was their lack of formal staff schooling. The Group thus proposed that CAS<sup>3</sup> be taken by all officers soon after their selection for promotion to major. Completion of the nonresident pre-CAS<sup>3</sup> course would become mandatory for consideration for promotion to major. To guarantee RC officer access to staff education, a nonresident CAS<sup>3</sup> would be available. Further, more RC officer seats would be allocated in CAS<sup>3</sup> and CGSOC together than in the previous resident CGSOC's. Therefore, all field grade officers would be schooled on staff procedures and techniques.



### CHAPTER III

#### ENDNOTES

1. US Department of the Army, Study Group for the Review of Education and Training for Officers, A Review of Education and Training for Officers (RETO), p. vi.

2. Ibid., p. vii.

3. Ibid., p. E-1-1.

4. Ibid., p. VI-5.

5. The actual recommendation was seventy-two RC officers per course.

6. Ibid., p. VIII-6.

7. Ibid., p. VI-5.

8. Ibid., p. E-1-4.

9. Ibid., p. E-4-2.

## CHAPTER IV

### CURRENT STATUS

The previous chapters have summarized the evolution of the Army's system for educating RC field grade officers from WW II until the release of the RETO report in 1978. However, the Army has not yet implemented all of this report's recommendations. This chapter will review the partial implementation of those recommendations and will further review the present status of the formal educational system for RC field grade officers. (See Figure 7 below.)

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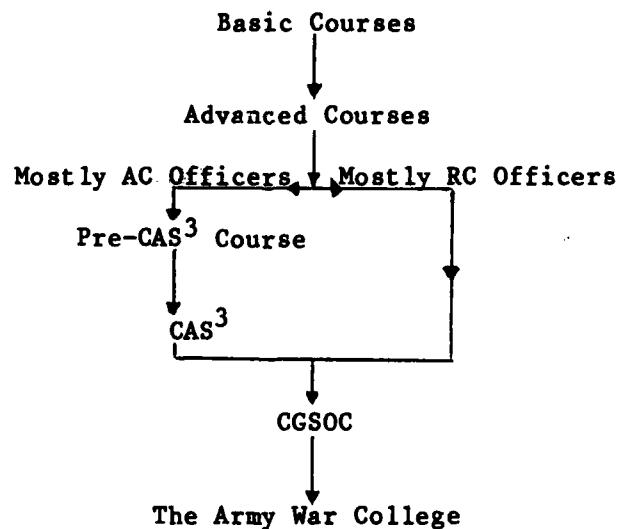


FIGURE 7: The Army's current formal military education system for AC and RC officers.

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## ADVANCED COURSES

Although the RETO Study Group recommended the elimination of the advanced courses, that has not happened. For example, Army commanders have insisted on the retention of advanced courses as necessary to prepare officer for company-level command, to train officers for company-level operations, and to teach these officers relevant branch and introductory topics to enable them to serve as staff officers in battalions and brigades.<sup>1</sup> Accordingly, the Army Chief of Staff has continued to defer any decision on the future of these courses.

So the advanced courses are currently being retained, but TRADOC plans to modulate them into three components: (1) The common subjects portion will teach the company-level topics which officers of any branch need to know; (2) The branch-specific subjects pertain to the branch-unique skills; (3) The remainder of the advanced course will consist of precommand and functional courses for specialty training unique to the particular assignment the officer might have, such as serving as a battalion S2. This proposed system can be easily adopted for RC officer education.

AC and RC officers do not necessarily study the advanced courses at the same point in their careers. Most AC officers are assigned to the advanced course between the third and fifth years of AFCS, near the beginning of their tours as captains. However, RC officers enroll in the advanced courses anytime between their appointment as a first lieutenant and their eighth year as a captain. Timing for RC officers is influenced by the regulations which set the minimum educational qualifications for promotion to major. Therefore, there is no easy, feasible solution to synchronize RC advanced course timing with that of AC officers.

## COMBINED ARMS AND SERVICES STAFF SCHOOL

In April 1980, the Chief of Staff of the Army approved CAS<sup>3</sup>, but with significant changes to the RETO proposals. Instead of offering CAS<sup>3</sup> only to those officers not selected for CGSC, he directed that all OPMD-managed officers will attend CAS<sup>3</sup>. Instead of having officers attend CAS<sup>3</sup> as majors in their tenth to twelfth years of AFCS, he directed them to attend in their seventh to ninth years of service. At present, AC captains are being assigned to CAS<sup>3</sup> at some time between the beginning of their sixth year and the end of their eighth year of AFCS. Accordingly, the Army Military Personnel Center (MILPERCEN) has assigned the same military education code to CAS<sup>3</sup> as it does to the advanced courses, however, AR 135-155 continues to equate CAS<sup>3</sup> to CGSOC for RC officers.

As the RETO Study Group proposed, the CAS<sup>3</sup> mission remains "to train officers of the Active and Reserve Components, worldwide, to function as staff officers with the Army in the field,"<sup>2</sup> which implies the obligation to provide staff training to all officers in the Total Army. Moreover, the course's POI states that CAS<sup>3</sup> provides each student:

- o The ability to analyze and solve military problems.
- o The ability to interact and coordinate as a member of a staff.
- o Communicative skills.
- o An understanding of Army organization, operations and procedures.

For the CAS<sup>3</sup> students' attainment of the first three of these goals, the CGSC has chosen a small group size and a 12:1 student-teacher ratio to provide a highly interactive learning environment between the officers and the instructor. The student's requirement to give briefings, to defend solutions orally, and to participate in group developments has contributed

substantially to the course's effectiveness. The practical learning methodology provides the students simulated staff work under realistic time constraints. During this 300-hour academic portion of Phase II, each student remains in the same group with the same instructor, simulating a staff within a mechanized infantry division and following this scenario:

- o Learn basic staff techniques. (8 days).
- o Develop a battalion training program and a command post exercise plan. (6 days).
- o Formulate and execute a budget. (4 days).
- o Plan and execute the mobilization of a RC roundout brigade. (4 days).
- o Prepare for a combat operations exercise, developing OPLAN's to employ the division in USAREUR. (15 days).
- o Deploy the division to Europe. (1 day).
- o Fight the war. (6 days).

With this mission, these goals, and this POI, CAS<sup>3</sup> has succeeded in teaching generic staff skills.

CGSC has set high qualifications for the CAS<sup>3</sup> instructor: recent, successful command of a battalion, graduation from CGSC, extensive staff experience, and a broad Army background. As the number of students per class increases, the school will have difficulty finding instructors with these qualifications, if only because enough former battalion commanders are not available. Thus, CAS<sup>3</sup> will rely on group leaders who have had extensive staff experience to fill the void. This instructional problem is small compared with the problem of exporting CAS<sup>3</sup> to the USAR schools. USAR schools will have extreme difficulty obtaining instructors meeting the CAS<sup>3</sup> criteria. Few former battalion commanders who are CGSC graduates are available in the Reserve Components, and they do not want to relinquish

their unit positions to be a USAR instructor. Recognizing this problem, CGSC has offered to train prospective USAR CAS<sup>3</sup> instructors at Ft. Leavenworth.

The Army plans to fully implement CAS<sup>3</sup> with the attendance of all year group 1977 officers managed by OPMD. Upon this implementation, such captains will attend in their sixth to ninth year of AFSC. Under MILPERCEN's portion of the Army's Five Year Promotion Plan and in line with DOPMS's provisions, these OPMD-managed captains will be promoted to major in 1986 or 1987. Therefore, CAS<sup>3</sup> should be fully implemented by 1987.

In FY 83, CAS<sup>3</sup> will train 960 students in four classes of 240 students each. At full implementation, CAS<sup>3</sup> plans to enroll 600 students per class, serving a total of 3000 officers per year. Meanwhile, the number of RC students in CAS<sup>3</sup> has dwindled from twenty-one in January 1982 to zero in the class starting in April 1983. As CAS<sup>3</sup> has evolved into an AC officer course designed primarily to teach staff skills, the Army has not provided for delivery of the same training to RC officers. The resident CAS<sup>3</sup> course is the only option presently available to RC officers.

Although CGSC has retained the Total Army Policy in the mission statement for CAS<sup>3</sup>--to train officers of the Active and Reserve Components--CGSC has developed a course structure and teaching methodology for CAS<sup>3</sup> which precludes CGSC from meeting the mission of this school. CAS<sup>3</sup> was implemented without provision for the unique needs of RC officers. There is little evidence that the CAS<sup>3</sup> developers seriously considered the variety of RC officers: ARNG and USAR unit officers, Individual Ready Reserve, Individual Mobilization Augmentees, full-time technicians, and statutory and Active Guard and Reserve (AGR) tour officers. Thus, even

though CAS<sup>3</sup> will be fully implemented for AC officers, CGSC has developed no mechanism for effectively exporting CAS<sup>3</sup> to RC officers. Therefore, CAS<sup>3</sup> will not be available to most RC officers in the near future.

Theoretically, CGSC prefers attendance of all RC officers in the resident CAS<sup>3</sup> course so that CAS<sup>3</sup> could be taught as CGSC desires. For several reasons, this residence option is not feasible or realistic:

- o Many employers will not grant leaves so that RC officers can attend the 9-week course.
- o Over 45,000 captains are in the reserves, including 24,000 in Selected Reserve. With current staff and facilities, CAS<sup>3</sup> could not absorb that many officers at Ft. Leavenworth. CGSC's formula for allocation of RC officers is one RC officer for every twelve students (fifty RC officers per 600 students), but recently no positions have actually been allocated for RC officers. Each RC officer attending CAS<sup>3</sup> takes an OPMD-managed position allocated to MILPERCEN. CGSC has neither instructors nor facilities for significant numbers of RC officers in CAS<sup>3</sup>. The quotas severely limit RC officer access to the resident CAS<sup>3</sup>.
- o No money has been allocated in the five-year POM for RC officer attendance at the resident CAS<sup>3</sup>. For years, neither the Army National Guard nor the Reserve have had enough money to send all officers wanting and needing resident training. Therefore, the RC's have given priority to those officers attending courses which satisfy promotion criteria. In the near future, the RC's will need to fund officers attending the resident CAS<sup>3</sup> from money budgeted for other education. Until CAS<sup>3</sup> becomes a mandatory course for promotion of RC

officers, the RC managers will give priority consideration to officers applying for courses satisfying promotion qualifications.

CGSC has developed a USAR school version of CAS<sup>3</sup>, but the course has not been implemented because of doubts that RC officers will enroll. Because USAR courses are taught only when enough students enroll at a school, TRADOC cannot order any school to teach CAS<sup>3</sup>. According to CGSC, 1986 is the earliest CAS<sup>3</sup> can be implemented in a USAR school. The proposed course will be offered in one-year span encompassing two annual training periods and nine weekends between the annual training periods. RC officers may be unwilling to attend these weekends in a non-pay status for such an optional course. Other RC officers may be reluctant to drive long distances to attend these USAR classes. Additionally, there are two limitations to the USAR CAS<sup>3</sup>: (1) The Ft. Leavenworth terrain reconnaissance cannot be done. (2) The USAR students will not receive the Hewlett Packard HP-41CV computers which are given the resident students. All of these factors make a USAR version of CAS<sup>3</sup> unlikely at this time.

CGSC has stated that a reduced length for the resident course or the USAR school CAS<sup>3</sup> is unacceptable. Thus, CGSC has no plans for developing a shorter RC CAS<sup>3</sup> as has been done for other courses in the military educational system.

For CAS<sup>3</sup> to be available to all RC officers, the Army must develop a correspondence course for it. CGSC has refused development of this course because the teaching methodology of the resident CAS<sup>3</sup> cannot be replicated in a correspondence version. The key to the success of the resident CAS<sup>3</sup> has been the face-to-face interaction between the class leader and students in a small class size environment. According to CGSC personnel, the student's high rate of attainment of the first three of the four student goals is a direct function of this interactive climate. In a



correspondence course, the interactive experience is limited to the faculty's analysis of student written submissions. As long as CGSC insists that this existing instructional methodology is essential for learning staff functions, it will be unwilling to develop a correspondence course for Phase II of CAS<sup>3</sup>.

In the fall of 1982, CGSC analyzed the similarity of the learning objectives for CAS<sup>3</sup> and the nonresident CGSOC. From this analysis, the college determined that the CAS<sup>3</sup> graduate has mastered the following CGSOC material found in the correspondence course mode: Subcourse 1: The Command and Staff; Subcourse 3: Fundamentals of Tactical Logistics; Subcourse 4: Operation JAYHAWK and Analytical Decisionmaking; Subcourse 5: Combined Army Fundamentals; and Subcourse 85: Staff Techniques. These subcourses correspond to the following USAR CGSOC instruction: M111, M212, M311, M411, M412, and M951. Thus, CAS<sup>3</sup> graduates enrolled in the FY 83 nonresident CGSOC will be given equivalent credit for these correspondence subcourses and USAR instruction. Altogether, this equivalency, called an "equivalence crosswalk" by TRADOC, involved 200 hours of the 624 hours in the 1982-83 nonresident CGSOC curriculum.

By 1986, CGSC plans to phase out of CGSOC the course content common to the CAS<sup>3</sup> instructional material, replacing this deleted content with new material. Immediately, two problems surface: (1) The "equivalency crosswalk" will cease to exist; (2) CGSOC students who are not CAS<sup>3</sup> graduates will not receive staff training which past CGSOC students have gained. Potentially, students in this dilemma are RC, AMMEDD, JAG, and allied officers and chaplains. One solution set forth by TRADOC and FORSCOM action officers would have such students complete--either by correspondence or in residence--a preparatory course of instructional content found in CAS<sup>3</sup>. Consequently, CGSC's proposals will expand the required formal

education for field grade officers in both the Active and Reserve Components.

The CGSC will initiate a comprehensive phase program in August for the resident CGSOC's. Self-evaluated, diagnostic tests covering fundamental topics will be sent with the welcome packets to the students. Using the test results as selection guides, the students can order self-instructional materials from CGSC to study prior to the start of CGSOC. A period has been reserved at the beginning of this resident CGSOC during which instructors will be available in the classroom to assist students deficient in subject areas. Through self-evaluation and self-paced instruction, each student will have the opportunity to build his knowledge base to a level common for all students.

For the international students, CGSC conducts an allied preparatory phase during the six weeks preceding the start of the resident CGSOC. These allied students increase their English language proficiency in this phase and study the comprehensive program materials. Also, the students from the other military services and professionals go to Ft. Leavenworth at the same time for the comprehensive subject education.

As presently envisaged by CGSC staff, the comprehensive program will be the vehicle for solving the problem of non-CAS<sup>3</sup> graduates attending CGSOC. CGSC considers the status of these deficient students to be analogous to that of a student pursuing a master's degree in a new academic area. The individual will have to make up prerequisite knowledge. The college intends to assist such students through alternate learning strategies such as video disks, audio-tutorial methods, computer-assisted instruction, etc. in a learning resource center. Even though CGSC will assist by furnishing learning materials, the burden of meeting prerequisite will rest with the deficient student.

What is the significance of these actions considered along with the deletion from CGSOC of material common to CAS<sup>3</sup>? In short, CAS<sup>3</sup> will be an implied prerequisite for CGSOC. Instead of being a course, as RETO recommended, to give staff training to those who do not attend CGSOC, CAS<sup>3</sup> is a course taken between the advanced courses and CGSOC. Requiring CAS<sup>3</sup> knowledge as a prerequisite, CGSOC is elevated to a higher level in the Army's educational hierarchy. With CAS<sup>3</sup>, the Army has added a new course level to its formal educational system.

#### COMMAND AND GENERAL STAFF COLLEGE

Prior to the establishment of CAS<sup>3</sup>, CGSOC was the formal Army military schooling beyond the advanced courses. This will remain for many AC officers until the full implementation of CAS<sup>3</sup> and for most RC officers into the foreseeable future. CGSOC is designed to prepare officers to be commanders at the battalion and brigade levels and to be staff officers at brigade and higher levels. Through the course, the Army teaches the latest doctrine for application within the division and corps. Thus, CGSOC is an extremely important course for the education and training of field grade officers in the Reserve Components.

CGSC-level education is available to Army officers through several means:

- o A 42-week CGSOC conducted annually at Ft. Leavenworth.
- o Other CGSC-level courses: the Armed Forces Staff College; the Navy, Marine, and Air Command and Staff Colleges; and the US Army School of the Americas.
- o A 19-week CGSOC (RC) offered two times per year at Ft. Leavenworth.
- o A nonresident CGSOC.

Containing six phases intended to be completed in a three-year period, the nonresident course parallels the resident CGSOC, although its material lags about two years behind the resident course because of the time required to rewrite and update its subcourses. CGSC offers three options for this nonresident CGSOC:

1. A correspondence course of approximately 600 credit hours.
2. A USAR version in which three phases are taught over a three-year span at the USAR school and three phases are taught at three two-week annual training periods.
3. A combination correspondence and USAR course in which the student takes a portion of the nonresident instruction by correspondence and a part with the USAR school.

Even though some AC officers can not attend a resident CGSOC because of its quota limitations and some RC officers can not secure release from their civilian jobs for the resident courses, they all have access to this level of military schooling because of the variety of nonresident options.

The opportunities for RC officers to attend resident training are more limited than for AC officers because of the funding and quota restrictions. Four Army Reserve officers attend the 42-week CGSOC and about seventy RC officers attend each 19-week CGSOC.<sup>3</sup> However, the nonresident modes present ample means for RC officers to avail themselves of a CGSOC education.

Annually, the Army selects approximately 950 AC officers for attendance at CGSC-level schools. Until recent years, the zone of eligibility was from eight through eleven years of AFSC, but the Army has modified this to make this selection process consistent with the DOPMA promotion criteria. Now the selection zone for CGSC attendance is after selection for promotion to major, but prior to the beginning of the fourteenth year of AFSC.

Approximately 50% of each year group is now attending the resident courses. AC officers who are not selected by the end of their thirteenth year of AFSC will have to enroll in the nonresident CGSOC if they want to study this course.

#### EDUCATIONAL QUALIFICATIONS FOR PROMOTION

Convinced the Army Chief of Staff intended to implement the pre-CAS<sup>3</sup> course and CAS<sup>3</sup> as recommended by the RETO Study Group, the Army changed AR 135-155, the regulation governing RC officer promotions. (See Figure 8.) First, the Army added the option of pre-CAS<sup>3</sup> completion as satisfying RC officers' educational requirement for promotion to major instead of advanced courses. Second, it stipulated CAS<sup>3</sup> completion as an option for meeting educational requirements for promotion to colonel. However, NGR 600-100 was not similarly modified. Therefore, these two regulations, each applicable to ARNG officers, are contradictory. Although the Army has retained the advanced courses and has implemented CAS<sup>3</sup> differently from the Study Group's recommendations, AR 135-155 sets forth the promotion amendments in Change 9.

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|                                |  |
|--------------------------------|--|
| Captain to Major:              | Advanced Course or Pre-CAS <sup>3</sup> Course |
| Major to Lieutenant Colonel:   | One-Half of CGSOC or CAS <sup>3</sup>          |
| Lieutenant Colonel to Colonel: | CGSOC or CAS <sup>3</sup>                      |

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FIGURE 8: Current minimum educational requirements for RC officer promotion under the provisions of Change 9 to AR 135-155. (See Figure 1 for current provisions of NGR 600-100.)

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Under provisions of Change 9 to AR 135-155, the RC officer who is able to attend the resident CAS<sup>3</sup> or the proposed USAR school version will find using CAS<sup>3</sup> completion as a qualifier for the 06 promotion gate easier than CGSOC. In contrast to the 624 hours required in the nonresident CGSOC, CAS<sup>3</sup> requires approximately 480 hours, including 142 hours in the nonresident pre-CAS<sup>3</sup>. However, few, if any, now support CAS<sup>3</sup> as a minimum educational criterion for promotion to colonel.

Other uses of CAS<sup>3</sup> to satisfy criteria for promotion to 05 and 06 will entail more work than utilizing the nonresident CGSOC. A nonresident CGSOC student completes one-half of CGSOC, requiring 312 hours, to qualify for promotion from major to lieutenant colonel; the CAS<sup>3</sup> student completes 428 hours. Even with the "equivalency crosswalk," the CAS<sup>3</sup> graduate requiring CGSOC completion for promotion to 06 needs 424 more hours; the student studying only CGSOC finishes only the second half of CGSOC, 312 hours of CGSOC beyond the lieutenant colonel promotion gate requirement. A comparison of these relative workloads shows that application of CAS<sup>3</sup> for promotion qualification is not likely to attract an RC officer to attend CAS<sup>3</sup>.

Thus, the provisions of AR 135-155 results in different educational standards at each field grade for RC officers compared to their AC counterparts. Additionally, the timing of AC officer attendance at military schools contributes to these disparate standards. AC and RC field grade officers of the same grade do not necessarily possess parallel military education.

For example, the timing of AC officer attendance at CGSC-level courses causes them to be majors' courses. That is because the DOPMA promotion objectives translate into the following years of AFSC at which promotions occur for field grade officers: captain to major is nine to eleven years and major to lieutenant colonel is fifteen to seventeen years. Actually,

the attributes of those selected for promotion closely matches these objectives. In 1982, the mean years of AFSC for those above or in the primary zone selected for promotion were 10.1 years to major and 15.1 years to lieutenant colonel. The 1982 selection board chose for promotion to lieutenant colonel 68% of the eligible majors considered for the first time. Of these, 92.7% were officially graduates of a CGSC-level course, although unofficially over 98% had attained this educational level. At the same time, 99.6% of those selected for promotion to colonel had CGSC-level education recorded in their records.<sup>4</sup> Effectively, CGSOC is becoming an educational criteria for AC promotion consideration for promotion to lieutenant colonel as well as to colonel.

For RC officers, ROPA mandates minimum time-in-service (TIS) requirements for Mandatory Board consideration for promotion. These minimums are twelve years TIS for promotion from captain to major and seventeen years from major to lieutenant colonel. Also, the RC officer must meet minimum educational criteria. One-half of CGSOC satisfies the criterion for RC promotion to lieutenant colonel and all of CGSOC satisfies the criterion for colonel. Of the Active Promotion List officers considered by the Mandatory Promotion Board during the last three years, over 80% of the majors had completed at least 50% of CGSOC and 93% of the lieutenant colonels had completed all of CGSOC.<sup>5</sup> The RC officer promoted under the Unit Vacancy Promotion System must also satisfy the same minimum educational criteria. Additionally, RC officers who are issued 50 percent completion certificates for CGSOC must complete the remainder of CGSOC within three years; otherwise they lose their federal recognition as a lieutenant colonel. Thus, the percentage of field grade officers satisfying the educational standards is higher than the Mandatory Board data indicates. In contrast to the RC officer educational criteria, the AC

officers do not have mandated educational minimum standards. Moreover, with both CAS<sup>3</sup> and CGSOC satisfying "promotion gates" for RC officers, the qualifications for RC officer promotion to the lieutenant colonel grade is not equal to that of AC officers.

#### CONCLUSION

The evolution of CAS<sup>3</sup> has created a deplorable situation in the Army's educational system for RC officers:

- o The RETO Study Group concluded all field grade officers need staff training.
- o The Study Group recommended CAS<sup>3</sup> for all officers not selected for CGSC-level courses.
- o The Chief of Staff of the Army directed all OPMD-managed captains to attend CAS<sup>3</sup>.
- o Army personnel familiar with CAS<sup>3</sup>--students and faculty--almost unanimously agree that CAS<sup>3</sup> has been a resounding success.
- o CGSC is phasing out of CGSOC those subjects taught in CAS<sup>3</sup>, thereby making CAS<sup>3</sup> a new level in the Army's military educational system.
- o FORSCOM, NGB, OCAR, and RCPAC are opposed to CAS<sup>3</sup> as an additional level of mandatory education for officers.
- o CGSC refuses to implement the USAR school CAS<sup>3</sup> course unless the RCs assure officer attendance and CGSC refuses to develop a correspondence version of CAS<sup>3</sup>.
- o RC officers who are not graduates of CAS<sup>3</sup> will have to learn staff functions through self-instruction.



- o CAS<sup>3</sup> graduates are qualified by regulations for promotion to colonel.

This evolution of CAS<sup>3</sup> has created a paradox in the matter of staff training. First, all OPMD-managed officers are to be assigned to CAS<sup>3</sup> upon its full implementation, because of these officers' need for staff training. However, RC officers, per present plans, will generally be denied access to that education except for self-instruction. The Total Army cannot permit this dilemma to prevail.

## CHAPTER IV

### ENDNOTES

1. The FORSCOM commander has been a strong proponent for the retention of the advanced courses. Commanders have voiced their positions at several commanders' conferences.

2. See the POI for the Combined Arms and Services Staff School course.

3. Information furnished by CGSC for the FY 83 classes.

4. The official data is compiled from the personnel records which the selection board had access to. Officers considered by the board had completed CGSOC, but the information was not in the records for all of the officers that the board considered. All data was furnished by MILPERCEN.

5. Based upon RCPAC data for the Mandatory Promotion Board action in the 1980, 1981, and 1982 calendar years.

## CHAPTER V

### RECOMMENDATIONS

The Army's increasing reliance on the Reserve Components places a greater responsibility on leadership in the National Guard and Army Reserve than RCs previously received in the Army's readiness posture. With formation of two new National Guard divisions within the next three years, the Army plans to expand its force structure to twenty-six divisions. Existing Army armor and mechanized infantry divisions will be upgraded to the Division 86 organization with roundout companies and platoons from the reserves, allowing the Army to restructure without increasing the AC's end strengths. Even today, many RC units have higher priorities in contingency scenarios than do Active Force units. For the Rapid Deployment Force to go to war, Lieutenant General John Kingston, CENCOM commander, recently said he needed most of the 100,000-man call-up.<sup>1</sup> When mobilized, these reserve units will have little time for additional training, and their officers will be required to lead with their current educations and training.

Therefore, the peacetime education and training of RC officers will be a critical factor in these units' capabilities to fight and win on the battlefield. In their most recent posture statement, Secretary Marsh and General Meyer stressed the significance of outstanding leadership: "The essential element is the individual soldier--well-equipped, well-trained, and well-led."<sup>2</sup> To insure proper leadership development in the Guard and Reserve, the Army must provide a system through which the military education for RC officers achieves parity with the AC's officer education. Considering the constraints and limitations faced by RC officer, the Army

must simultaneously develop educational alternatives for these officers as it up-grades the formal military educational system for AC officers.

With the introduction of CAS<sup>3</sup> into the formal military educational system and the planned modifications to CGSOC, the Army is developing a system which effectively excludes most RC officers from formal staff education. If the present trend continues, the Army will not meet its readiness needs in the context of the Total Army officer, nor will it meet the needs of the individual RC officer. The following recommendations will redirect the educational trend. These recommendations are categorized into two areas: Those actions requiring immediate attention, and those actions requiring attention in future years.

#### RECOMMENDATIONS FOR IMMEDIATE IMPLEMENTATION

1. Delete from AR 135-155 the provision allowing completion of the nonresident pre-CAS<sup>3</sup> as satisfying the educational requirement for promotion from captain to major. Require advanced courses as the single requirement.

The regulation was written under the assumption that the Army was going to eliminate the advanced courses and replace them with functional courses. Time has proven this assumption false. The advanced courses have been retained and the OPMD-managed AC officers are attending them. Likewise, the RC officers need the advanced courses' training and the regulations should not indicate otherwise by allowing the substitution of the nonresident pre-CAS<sup>3</sup> for the advanced courses.

2. Delete from AR 135-155 the provision that CAS<sup>3</sup> satisfies the educational criteria for promotion to lieutenant and to colonel. Require 1/2 of CGSOC for promotion to lieutenant colonel and the entire CGSOC for promotion to colonel.

This regulation was written under the assumption that CAS<sup>3</sup> would be a major's course for those not selected to attend CGSOC. CAS<sup>3</sup> is not a major-level course; it is a captain-level course. Upon full implementation of CAS<sup>3</sup>, all OPMD-managed officers will attend CAS<sup>3</sup> as captains under present plans. Further, CAS<sup>3</sup> is not equivalent to 1/2 of CGSOC nor the full CGSOC. Already, AC officers are leaving active duty after completing CAS<sup>3</sup> and joining the reserves fully qualified educationally all the way to colonel. The application of this regulation implies a different educational standard for RC officers than for AC officers.

3. Place in abeyance all plans for removing from CGSOC the subject material common to that in CAS<sup>3</sup> pending resolution of the military educational system for RC officers. Retain in CGSOC the common curriculum.

Upon full implementation of CAS<sup>3</sup>, the present plans for CAS<sup>3</sup> and CGSOC will not provide any formal military staff training for RC officers except the self-instruction of the proposed CGSC "Comprehensive Program." Meanwhile, all OPMD-managed officers will receive staff training in CAS<sup>3</sup>. Before CGSC eliminates this staff training from CGSOC, the Army needs to decide if this dual standard staff training is in the best interest of the Army and the RC officer.

Moreover, the RETO Study Group recommended that CGSOC become a higher level course for the 20% of the field grade officers who need such education. The cost savings from the enrollment reductions were supposed to offset the increased costs of offering staff training to all officers through CAS<sup>3</sup>. Instead of reducing CGSC enrollment from 40% to 20% of each year group, the Army has increased this selection percentage to 50% of each year group. The Army needs to do a cost-benefit analysis and a cost-effectiveness analysis of these plans to require CAS<sup>3</sup> attendance by all OPMD-managed captains and to have 50% of the field grade officers attend an

expanded CGSOC course. Such an analysis should determine whether the Army should delete the CAS<sup>3</sup> commonality from CGSOC and should thus expand the CGSOC curriculum to replace the deleted material.

4. Convene a conference under the auspices of the Army Chief of Staff of representatives of DCSPER, DCSOPS, NGB, OCAR, RCPAC, TRADOC, CGSC-CAS<sup>3</sup>, and FORSCOM to resolve the issue of field grade education for RC officers and the associated promotion gate issue.

In the three years since the Army Chief of Staff approved CAS<sup>3</sup> for all OPMD-managed captains, these headquarters and offices have disagreed on formal military education for RC officers and the relationship of the promotion gates to that education. Meanwhile, CGSC has proceeded with the implementation of CAS<sup>3</sup> and with plans for modifying CGSOC without solving the schooling issues for RC officers. This process is resulting in an inequality between AC and RC officer educational systems and in inappropriate Army regulations governing RC officer promotions.

All of these agencies and headquarters must convene on this issue so that each can present its valid, justifiable rationale for its position. Since their positions are disjoint and apparently uncompromising, someone at the level of the Army Chief of the Staff must make decisions on the issues to break the impasse.

In his cover letter for the DCSOPS Implementation Plan for RETO, General Otis, then the Army Deputy Chief of Staff for Operations and Plans, offered a caveat which has not been heeded, but should be addressed by such a conference:

Specific attention is invited to RETO issue 20i in which the CSA approved the concurrent development of Reserve Components options for all new courses or present course modifications. This objective can be achieved only if proper analyses are made of the training and education requirements for the Total Force during all planning and resource allocation phases of the development processes. The simultaneous development of the nonresident

alternatives to resident courses, e.g. correspondence courses, USAR schools, or resident/nonresident options, will ensure that all Reserve Officers have equal access to the new education prerequisites for promotion during the critical transition period when the new RETO system is being phase in.

5. Offer sufficient spaces at CAS<sup>3</sup> for Army National

Guard and Army Reserve officers who are assigned to staff positions at the battalion, brigade, and division levels. Provide Army funds to send such officers to CAS<sup>3</sup>.

The RC officer most critically needing the CAS<sup>3</sup> education are those assuming staff positions at the battalion, brigade, and division levels. The Army should use CAS<sup>3</sup> as a functional course in the same manner in which the precommand courses are utilized for preparing officers assume a command. Additionally, the Army should allocate funds for this training to NGB and OCAR because these headquarters do not have money in their budgets specifically dedicated to send RC officers to CAS<sup>3</sup>.

RECOMMENDATIONS FOR FUTURE IMPLEMENTATION

1. Change AR 135-155 to make CGSOC completion the single educational requirement for promotion from major to lieutenant colonel.

Because CGSOC prepares officers for duty as commanders of battalions and equivalent size organizations and as staff officers at brigade and higher levels, RC officers need to complete CGSOC prior to becoming lieutenant colonels.

After receiving the certificate for completing the first half of CGSOC, the RC officer currently has a three-year period for completing CGSOC in order to prevent the loss of his commission. The proposal eliminates this provision. However, the recommendation would still allow the major a seven-year window in which to complete the course for mandatory promotion consideration under ROPA or ROPMA proposals.

The Army should apply the provision only to RC captains promoted to major subsequent to the effective date of the change. Thus, field grade officers already in the reserves would continue to be governed by the previous provisions of AR 135-155.

2. Divide all of the Army CGSC courses into two major phases and maintain the present length of these courses.

The first phase would consist of that course material which CGSC has identified in the "equivalency crosswalk" to be similar to that taught in CAS<sup>3</sup>. Those who graduated from CAS<sup>3</sup> would be credited for this phase of CGSOC. On the other hand, AC officers who are not CAS<sup>3</sup> graduates, allied officers, RC officers, and officers from the other services would have access to formal staff training in this phase.

The second major phase of CGSOC would be the remainder of the present course not in the identified "crosswalk." All CGSOC students would take this phase.

RETO identified the need for all officers to receive formal staff training. If that need is valid, the present proposal of CGSC to delete from CGSOC the staff training similar to CAS<sup>3</sup> and to require the non-CAS<sup>3</sup> graduate to learn the material through self-instruction does not meet the RETO recommendation for formal staff training.

Moreover, the effect of the present CGSC proposals is to expand the content and depth of CGSOC. Already, some senior officers have expressed concern if we are devoting too much of the officers' careers to schooling and too little to their utilization of learned skills and knowledge. Therefore, such expansion should not be undertaken until the Army determines the financial and educational effectiveness of it.

This recommendation would save the Army educational costs by reducing the length of attendance at the resident CGSC courses for those officers



who have completed CAS<sup>3</sup>. Additionally, it would give the flexibility for officers' access to generic staff training without adversely impacting on them as the present implementation of CAS<sup>3</sup> does. No change in RC officer educational qualifications for promotions would be necessitated by this recommendation.

This recommendation would be implemented as soon as CGSC and MILPERCEN modify administrative and personnel procedures, perhaps as early as the summer of 1984.

3. Change AR 135-155 to make completion of both the advanced courses and the nonresident pre-CAS<sup>3</sup> the educational requirements for promotion from captain to major, if the CAS<sup>3</sup> implementation continues as presently planned.

Under present CAS<sup>3</sup> implementation plans, all OPMD-managed captains in Year Group 1977 will be scheduled for CAS<sup>3</sup> attendance. In contrast, few RC officers will attend. The resulting dual educational systems for AC and RC officers is unacceptable for the Total Army Policy.

The impact of adoption of this recommendation could be significant. Over the past three calendar years, 41% of the captains considered by the RC Mandatory Selection Board had not completed the advanced course requirement.<sup>3</sup> An additional condition as proposed here will certainly increase these non-selection percentages, forcing more officers out of the reserves. However, under the Total Army Policy, these captains need some staff training prior to promotion to major if they are to remain competitive with their AC counterparts. On the other hand, if the existing CAS<sup>3</sup> implementation plans are modified, then this recommendation will have to also be modified.

4. Establish a staff study under the auspices of the Army Chief of Staff to analyze the role of CAS<sup>3</sup> in the total formal educational system for both AC and RC officer education.

Among the questions which the study would answer are:

- o Is the Army requiring too much by having officers attend CAS<sup>3</sup>, additional specialty training, and graduate school in the same period of the officer's career?
- o Would it be more effective to include CAS<sup>3</sup>, in part or in total, with the advanced courses or with CGSOC?
- o Should the instructional methodology currently used in CAS<sup>3</sup> be a fundamental consideration in all decisions regarding offerings of CAS<sup>3</sup>, even if this consideration results in denying access to CAS<sup>3</sup> to most RC officers?

## CHAPTER V

### ENDNOTES

1. Major General William E. Ingram, "Mobilization Training at Annual Training," "National Guard," March 1983, p. i.

2. John O. Marsh, Jr. and General Edward C. Meyer, Posture Statement, p. 12.

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## ACRONYMS AND DEFINITIONS

Active Components (AC): The portion of the Army serving full-time duty in the active military service of the United States who are paid from the military personnel appropriation of a Department of the Defense Military Service and accounted for in the active strength authorization.

Active Duty Guard/Reserve (AGR): The status of Ready Reservists on full-time active duty of 180 days or more to provide full-time training and administration support to the Ready Reserve and who are paid from the Reserve personnel appropriations of a Department of Defense Military Service.

Active Federal Commissioned Service (AFCS).

Combined Arms and Services Staff School (CAS<sup>3</sup>): A school to train officers of the Active and Reserve Components for service as field grade staff officers with the Army in the Field, in peace or war.

Command and General Staff College (CGSC).

Command and General Staff Officers' Course (CGSOC).

Forces Command (FORSCOM).

Individual Mobilization Augmentees (IMAs): Pretrained Individual Reservists who are preassigned to an active unit to which they will report upon mobilization. This term replaces the previous term "Mobilization Designee."

Individual Ready Reserve (IRR): Pretrained Individual Reservists available for use as fillers or replacements.

Inactive National Guard (ING): Pretrained Individual Reservists who are preassigned to a specific National Guard unit and who would mobilize with that unit.

Military Qualification Standard (MQS): This system, based on officer job/task analysis, specifies expected competencies of officers at different stages of their careers. It provides, when fully implemented, a framework for officer education and training that links resident schooling, self-study and on-the-job experience. The system is being initiated at the company grade level.

Military Personnel Center (MILPERCEN).

Officer Personnel Management Directorate (OPMD): An element of the US Army Military Personnel Center whose members execute the DA responsibility for Officer Personnel Management System (OPMS) managed officers.

Reserve Components Personnel Administration Center (RCPAC).

Selected Reserve: Composed of drilling reservists and Full-Time Support (FTUS) personnel, including AGR personnel, full-time technicians, and AC personnel assigned to a unit, but not occupying a unit position in the Reserves.

Training and Doctrine Command (TRADOC).



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**TRADOC**

**CGSC**

**TAG MICHIGAN**

**38th ID, INDIANA ARNG**

**END**

**FILMED**

**8-83**

**DTIC**